

**PX-31**

Event Title: Roundtable breakfast with Don Harrison)

## Event Overview

Date: September 13th, 2018

Time: Door opens at 7:15, Session 7:30 – 9:00 (Internal briefing starts at 7:15)

Venue: Google Japan 29F Partner Plex Tokyo

**Googler Executive(s):** Donald Harrison, Bonita Stewart (VP, LPS), Patrick Jabal (VP, GPP), Dave Graham (VP, GBD), Ryu Hirayama (LPS), Shinichi Abe (GCP)

**Googler Host:** Wakana Tanaka (Moderator, PPx)

**Googler Notetaker:** Kanako Yagi

**Languages:** English

**Translation:** There is no translation

**Dress code:** Business

**Omiyage (gift):** Google Home Mini

**Meishi (business card):** Please bring your business cards to exchange

**PPx tour for visitors after breakfast?:** Y, if their time allows (9:00~

**Event Goal:** To deepen partnerships and reputation with key influencers in Japanese to foster future partnerships and cross-functional collaboration with Google.

### Talking points:

- Google's strategy and initiatives for partnerships and innovations, as well as priorities
- Asking for some direct feedback from top partners
- How could Google become a better partner for you?

### Time Table

Time	Content & Talking points (if any)	Venue
7:15	Briefing (Internal)	
7:30	Guest arrival / Exchange business cards / Breakfast starts	Panorama
8:00	Roundtable Starts <ul style="list-style-type: none"> <li>● House Keeping: Off the record, closed</li> <li>● Moderator introduces speaker</li> <li>● Moderator facilitates self introduction</li> </ul>	Summit
8:05	Opening Speech by Don <ul style="list-style-type: none"> <li>● Share Google's Strategy on Innovation &amp; Partnership</li> <li>● Inspire them to partner with Google</li> <li>● Pathway for Startups, advice</li> </ul>	Summit
8:10	Open up for free discussion / Q&A Moderator makes sure everyone makes comments/questions	Summit
8:55	Final Closing from Don	Summit



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9:00	Kiss and Goodbye	
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### Attendees

<b>Mr. Shinichiro Muroyama</b>	LINE Corporation
<b>Mr. Masahiro Ito</b>	Start Today (ZOZOTOWN)
<b>Ms. Hiromi Ohnishi</b>	Asahi Shimbun
<b>Mr. Masaki Ogata</b>	JR East
<b>Mr. Yasukane Matsumoto</b>	Raksul
<b>Mr. Kotaro Yamagishi</b>	Keio Innovation Institution

### Guests (Bio & business background)

 LINE Corporation	
	<p><b>Mr. Shinichiro Muroyama</b> Executive Officer / Head of Business Strategy Department</p> <p>Shinichiro Muroyama is currently the Executive Officer and Head of Business Strategy Department in LINE Corporation. Prior to joining LINE in March 2017, he managed Total CE, Hardlines at Amazon Japan G.K as a Category Leader. In 2003, he joined a bridal company TAKE AND GIVE. NEEDS Co., Ltd., and was appointed as director and CFO in 2009. In conjunction with the company's international expansion, he supervised the startup businesses in Shanghai, Shenzhen, Hong Kong, Taiwan, and Indonesia, and served as the director and representative director in each company. He graduated from Doshisha University in 1995, and started off his career at Sumitomo Marine &amp; Fire Insurance Co., Ltd. (now the Mitsui Sumitomo Insurance Company, Limited)</p>
Company Overview	<p><u>LINE</u>: Japan's largest mobile messaging application, holds a similar position in Japan, Taiwan, and Thailand as WhatsApp in Europe.</p> <p>LINE Corporation provides a cross-platform messenger application LINE for mobile messaging and communication services primarily in Japan, and other Asian countries. It also provides communication and</p>

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	<p>content sales, advertising services through LINE advertising, and livedoor and NAVER Matome Web portals. The company was established in 2000 as NHN Japan Corporation, and changed its name to LINE Corporation in April 2013. The headquarter is in Tokyo, Japan. LINE Corporation is a subsidiary of Naver Corporation.</p> <p>After being listed in 2017, the company scale has expanded further and the range of possibilities of the business has also expanded. In order to continue growing at a higher speed, the limitation appears in the conventional system. In order to solve it and to achieve greater growth, it was the role of executive officer in charge of business development, and to reorganize the business strategy.</p>
Statistics	<ul style="list-style-type: none"> <li>● The number of employees is 1,692 as of April 2018.</li> <li>● 76 million monthly active users in Japan as of Q2 2018</li> <li>● DAU/MAU for LINE messenger is 85% in JP</li> </ul>
Cross-Google Business Relationship Highlights	<p><b>Recent highlights</b></p> <ul style="list-style-type: none"> <li>● Proposed JBP(Draft deck) with Executive Sponsor at LINE (Mr. Masuda, #2 at LINE, Board Director / CSMO).</li> <li>● LINE once declined to implement Google Web Search in its Messenger and did not close JBP with Google. However, after Google explained the advantages of JBP, Mr. Masuda agreed to explore "Out of Box Ideas" and to revisit the possibilities of JBP with Google in late 2018.</li> </ul> <p><b>Global Partnerships</b></p> <ul style="list-style-type: none"> <li>● [LPS] LINE is one of the top display partners in JP. (ARR \$32.4M) LINE monetizes their messenger app with AdX in TW, TH, ID, but do not use AdX for JP inventory. Current revenue is mainly from their web services such as livedoor blog or livedoor news</li> <li>● [GPP x Channel Sales(GMS)] Discussing to test Click to chat implementation on Google My Business</li> <li>● [Pay] Decided to use Google Pay to enable NFC on Android devices for LINE Pay</li> </ul> <p><b>YouTube:</b></p> <ul style="list-style-type: none"> <li>● YT Embedded player is implemented, LINE users can search and watch YT contents in their chat rooms (Implemented YT SDK for LINE)</li> </ul> <p><b>Google Analytics:</b></p> <ul style="list-style-type: none"> <li>● Top GA360 partner (publisher side) in Japan</li> </ul> <p><b>Play:</b></p> <ul style="list-style-type: none"> <li>● <u>One of the top revenue contributors for Play for both apps and games verticals. An important technology partner in terms of Android/Play feature adoption but they also wants to grow their own gaming/digital content platform ecosystem where sensitivity exists. LINE is a top company of 2017 Worldwide combined iOS &amp; Play Apps Revenue. However, LINE is a competitor as a game platform, the team tries to maintain sensitive relationship with them</u></li> </ul>

**Comment [1]:** +chongsa@google.com  
Can you review this statement - thought LINE STORE is an issue since users can bypass Play and purchase credit directly from LINE STORE. Is this correct? Also, does this mean that just a fraction of revenue is lost from Play perspective?  
\_Assigned to Chongsa Kim\_

**Comment [2]:** Thanks for looping me in. Please take a look at the revised sentence.


Since it's a sensitive topic, I prefer to discuss offline or over hangout. Please let me know if you need more info from Play.

+evankojima@google.com fyi


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One Google Goal	Bringing people, information, and services [much] closer together
Sensitive areas hot button issues to be aware of	<ul style="list-style-type: none"> <li>● AdWords is competing with LINE Ads Platform (LAP)</li> <li>● Google Home is competing with LINE's Smart Speaker, Clova</li> </ul>
 <p>START TODAY CO., LTD.</p>	
	<p><b>Mr. Masahiro Ito</b> <b>Executive Director (Board Director)</b></p> <p>Masa oversees the engineering and development of all Start Today and related companies. He is responsible for the creation of the <u>ZOZOSUIT</u>, auto body measurement suit.</p> <p>Prior to joining Start Today, Masa was the founder and CEO of Yappa Corporation (2000-2014). After Yappa's acquisition by Start Today in 2014, he became CEO of Start Today Engineering (currently Start Today Technologies) and oversaw technology and engineering for the group. Currently he is a board member of Start Today, overseeing the private brand "ZOZO".</p>
Company Overview	<p><u>START TODAY</u> was established in May 1998, headquarter is in Chiba, Japan. Selected as <b>Forbes Asia's 200 Best Under A Billion</b> in 2017.</p> <p>The main business, "<u>ZOZOTOWN</u>" is the largest online fashion shopping website in Japan. Over 1,100 stores offering more than 6,400 brands as of March 2018. Another one is <u>ZOZOSUIT</u> which is an original body measurement suit; it can make measurements by photographing the 300-400 dot markers that over the entire suit from a 360 degree angle with a smartphone camera.</p> <p>Start Today Co., Ltd. engages in the e-commerce business. It operates through the following business divisions: Zozotown Business, B to B Business and Media Business. The Zozotown Business division provides fashion shopping site called Zozotown and branded clothes shop called Zozoused. The B to B Business division manages the sale, system development, design, production, logistics contractor, and marketing support of the EC sites. The Media Business division provides the fashion coordination services site called Wear.</p>
Cross-Google	<b>ZOZO's Top Business Priorities:</b>

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<p>Business Relationship Highlights</p>	<ul style="list-style-type: none"> <li>● Will focus on the fashion EC market and expand ZOZOTOWN business while promoting private brand business and advertisement business as a new initiative and accelerating development to various business areas</li> <li>● Goals for the next 10 years include: 1) No.1 in online SPA in the world, 2) Top 10 global apparel players, and 3) market capitalization of 5 trillion yen in 10 years</li> </ul> <p><b>Global Partnerships:</b></p> <ul style="list-style-type: none"> <li>● Started to monetize ZOZOTOWN (No.1 fashion e-commerce in JP) and WEAR(Fashion SNS app in JP) with AdX(*Only for WEAR) and AFS (AdSense for Search) ARR \$3.2M</li> <li>● Discussing opportunity on SPA(MADS). Currently ZOZO uses Supership's MADS, but promised to test our solution SPA to judge better solution for them</li> <li>● Pay team is discussing to add Google pay as a payment option for ZOZOTOWN</li> </ul> <p><b>Cloud:</b> Big Query user. Decided to use G Suite Enterprise replacing from MS Office</p> <p><b>Google Analytics:</b> GA360 user. Under discussion how ZOZO can leverage their own data for their data marketing with Google Marketing Platform (DBM)</p> <p><b>GMS:</b> Planning to increase marketing budget this year including AdWords. Decided to test \$200k UAC in Sep 2018</p> <p><b>V/AR Product:</b> Discussing how Google can help improve the resolution of sizing data ZoZo collected from users. As future opportunity we may want to discuss E2E virtual designing/fitting application</p>
<p>One Google Goal</p>	<p>Revolutionize fashion industry globally with unique data and Google's cutting-edge technology</p>
<p>Sensitive areas hot button issues</p>	<p>Fast Retailing (Uniqlo) is their competitor. The new initiative with Google partnership is not announced yet at the point of this roundtable.</p>
<div data-bbox="509 1264 800 1371">  <p>The Asahi Shimbun</p> </div>	

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	<p><b>Ms. Hiromi Ohnishi</b>  <b>Executive Director, Digital Business / International Affairs</b></p> <p>Ms. Onishi has led the digital business at Japan's 2nd largest newspaper company. Responsibilities she took include being the CEO of Asahi Interactive, Executive Manager at TV Asahi. She also conducted research at MIT Media Lab as a visiting scientist in 2013-2014.</p> <p>Ms. Onishi's Top 3 priorities include:</p> <ol style="list-style-type: none"> <li>1. Increase "Site Power" and grow pageviews</li> <li>2. Maximize digital contents revenue from ad and subscription model</li> <li>3. Build new business model around ads and contents providing</li> </ol>
<p>Company Overview</p>	<p>The Asahi Shimbun is one of the five national newspapers in Japan. Its circulation, which was 6.6 million for its morning edition and 2.1 million for its evening edition as of June 2015 was second behind that of Yomiuri Shimbun. PV of Asahi Newspaper digital counts 570M/month with 32M unique browsers. The company has its registered headquarters in Osaka. Nikkan sports, TV Asahi and Asahi Broadcasters Corporation are group companies.</p>
<p>Top 3 Publisher Partnerships Focus Areas</p>	<ul style="list-style-type: none"> <li>● Create a significant step change in web performance</li> <li>● Build next generation of newsroom through digitization</li> <li>● Expand digital business with new product</li> </ul>
<p>Cross-Google Business Relationship Highlights</p>	<p><b>Global Partnerships: STRONG</b></p> <ul style="list-style-type: none"> <li>● 1:1 Partner Program Partner in APAC and Top Priority Partner in Japan. Closed <u>JBP</u> in Q2.</li> <li>● Fully ramped up on DFP usage and keen on growing more programmatic revenue</li> </ul> <p><b>YouTube: Strong</b></p> <ul style="list-style-type: none"> <li>● Launched new YouTube channel called "<u>Bukatsu ONE</u>" in 2017 along with Asahi Broadcasters Corporation to attract younger generations</li> </ul> <p><b>Google Analytics: Moderate</b></p> <ul style="list-style-type: none"> <li>● Implemented Google Analytics 360 (to execute JBP commitment, Asahi implemented GA360 along with Adobe)</li> </ul> <p><b>GMS: Moderate</b></p> <ul style="list-style-type: none"> <li>● GMS partner, LPS introduced their marketing team to GMS team</li> <li>● Started discussing how Asahi could leverage AdWords on campaigns</li> </ul> <p><b>Play (Play Books, Newsstand, App): Moderate</b></p> <ul style="list-style-type: none"> <li>● One of the early adopters of Newsstand</li> <li>● Launch partner of AMP</li> </ul>
<p>One Google Goal</p>	<p>Support Asahi's 3 Partnerships Focus Areas (listed above) and make Asahi Digital more attractive to new and existing users</p>

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Sensitive areas hot button issues	<ul style="list-style-type: none"> <li>● No sensitive areas/issues to be aware of at this point</li> </ul>
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 East Japan Railway Company (JR East)	
	<p><b>Mr. Masaki Ogata</b> <b>Vice Chairman</b></p> <p>Mr. Ogata joined Japanese National Railways (JNR) in 1974 and afterward was assigned to East Japan Railway Company (JR East) when JNR was divided and privatized in 1987. In JR East, he has experienced various management positions including Customer Service, Investment Planning, Public Relations, Transport Safety, and Transport and Rolling Stock Department. From 2008, as Executive Vice President, he took the full responsibility of the management of the safe and reliable operator of railway network with daily 17 million passengers. At the same time, he also strongly led the very important railway projects such as the further development of the smart IC card "Suica". As Vice Chairman of JR East since June 2011, he has been driving the open innovation and the open globalization of the management and technology onward to enhance the quality and variety of overall business domain of JR East.</p>
Company Overview	<p>East Japan Railway Company is a major passenger railway company in Japan and one of the seven Japan Railways Group companies.</p> <p>It has three business segments. The Transportation segment operates</p>



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	<p>railway routes, including the bullet train lines and the conventional railway lines mainly in the Kanto area and the Tohoku area. The Station Space Utilization segment establishes commercial space in the railway stations and operates restaurants and retail stores. The Shopping and Office segment is engaged in the operation of shopping centers and the leasing of office buildings located in the railway stations and surrounding areas. The Company is also engaged in businesses related to hotels, advertising agency, tourism, wholesale, truck delivery, credit cards, information processing, as well as cleaning and maintenance, among others.</p> <p>The International Division of JR is also developing overseas business in cooperation with other companies and groups, such as the operation of the West Midlands railway in the UK, and supplying vehicles to Bangkok Metro. As a company operates railways, JR East is the biggest in the world (the number of people transported x the distance), and it is comparable to the German Railway in transportation revenue. The communication slogan is "TICKET TO TOMORROW."</p>
<p>Cross-Google Business Relationship Highlights</p>	<p>Google Cloud started establishing the top exec relationship with Mr. Ogata, Vice Chairman as well as other senior execs such as Mr. Ota (CIO/CTO). Mr. Ogata is very keen to build a holistic and strategic partnership between JR East and Google across functions, and would like to establish a corporate wide streamlined "One Window" engagement model in their attempt to develop a new business model and platform together with Google.</p> <p>The possible key collaboration are as follows:</p> <ul style="list-style-type: none"> <li>● Digital marketing</li> <li>● Maps</li> <li>● Big data ranging Suica transaction data</li> <li>● Payment</li> <li>● Assistant</li> <li>● RPA (Robotic Process Automation)</li> <li>● Cultural transformation and productivity analytics (&amp; G Suite)</li> </ul> <p>In addition, some key numbers to speak about JR East are below:</p> <ul style="list-style-type: none"> <li>● 17.5M customers/day</li> <li>● 12,000 trains/day</li> <li>● 1,700 train stations</li> <li>● 13,000 rolling stocks</li> <li>● \$38B fixed assets (buildings, fixtures and machinery etc.)</li> <li>● \$6B Capex</li> <li>● 120M - 150M Suica transactions/day &amp; 5M Mobile Suica users</li> <li>● 55,000 employees</li> </ul> <p>&lt;Relationship status&gt;</p> <p>As above, just started the top exec engagement while each of Google team has business with JR East.</p> <p>From the top exec relationship perspective, Mr. Ogata will host GP leads and Google Cloud members to Tokyo Station Tour on Sep 11 with pursuing the aforementioned company wide partnership. In addition,</p>

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	<p>we will host Mr. Ogata to PartnerPlex Tokyo in Tokyo to further discuss our partnership.</p> <p><b>Global Partnerships:</b></p> <ul style="list-style-type: none"> <li>● None particular at this point, but DOOH can be a monetization opportunity</li> <li>● If companies agree to discuss xG partnerships, LPS will provide BD support</li> </ul> <p><b>Cloud:</b></p> <ul style="list-style-type: none"> <li>● The point of contact for Mr. Ogata</li> <li>● Proposing G Suite for its 55,000 employees' workstyle transformation</li> <li>● Identifying possible opportunities for Google Cloud Platform(GCP) such as Data Analytics Platform for Suica (JR East's mobile payment instrument)</li> </ul> <p><b>LCS:</b></p> <ul style="list-style-type: none"> <li>● \$1.5M/year business with Google at Parent Level (including child companies), currently increasing +180% yoy</li> <li>● Have contact with Mr. Ryoji Akaishi (Managing Director, Sales &amp;Marketing Division and Olympics Project) and Ms. Kimiko Sakamoto(Director, Sales &amp; Marketing Division)</li> <li>● They have decided not to use TVCM for a specific campaign (JR SkiSki) and decided to plan it with digital media centric, using solely Google data (e.g. Insights Finder/Query Analysis/Google Survey)</li> <li>● They are likely to start inbound marketing for the first time for ski market, with user insights (query data / 3rd party data) submitted by Google</li> <li>● They (System Innovation Div) have decided to utilize their app data (JR East App) , created DMP at their inhouse agency, and will use DBM starting from Oct.</li> <li>● Also have contact with System Innovation Division (re gPay) and introduced Holger Luedorf (MD of Partnerships) to JRE's Olympics Project Team (The head is Mr. Akaishi, MD of Sales &amp; Marketing)</li> </ul> <p><b>Google Analytics:</b></p> <ul style="list-style-type: none"> <li>● Google Analytics 360 Customer</li> <li>● Contact with system division through NRI Netcom</li> <li>● Had a KPI and GA360 mini seminar for Sales &amp; Marketing Division to expand GA360 usage and optimize whole of their marketing action.</li> </ul> <p><b>Maps/Global Product Partnerships:</b></p> <ul style="list-style-type: none"> <li>● Initiated executive level engagement for further collaborations to make the navigation for train rides/through train stations better (follow up meeting on Sept 12th)</li> </ul> <p><b>Google Pay:</b></p> <ul style="list-style-type: none"> <li>● Suica (transit / emoney) is available on Google Pay May 2018.</li> <li>● Supporting commuter pass renewal feature on Sep 2018.</li> </ul>
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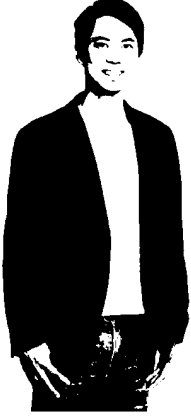
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	<ul style="list-style-type: none"><li>● Currently discussing Suica as a form of payment on Google Play Store (Imali project).</li></ul>
One Google Goal	Establish a company-to-company partnership and mutual win-win relationship
Sensitive areas hot button issues	<ul style="list-style-type: none"><li>● No sensitive areas/issues to be aware of at this point</li></ul>



Raksul Inc.

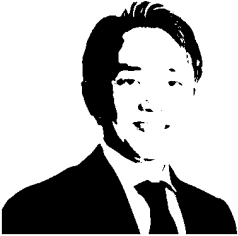
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	<p><b>Mr. Yasukane Matsumoto</b> <b>Founder &amp; CEO, Raksul Inc.</b></p> <p>Yasukane founded Raksul Inc. in 2009 with the vision of bringing innovation into the printing industry and reduce inefficiencies in the industry value-chain. In 2013, he launched 'raksul.com', an e-commerce printing platform serving SMEs by utilizing existing printing factories' excess capacity. In December 2015, he launched 'hacobell', an online sharing platform for trucking services to solve the on-going capacity challenge in the Japanese logistics industry. In 2018, Raksul Inc. was ranked top in "Startup of the Year" by Forbes Japan and is now listed on the Tokyo Stocks Exchange.</p> <p>Before founding Raksul, Yasukane worked as a consultant for A.T. Kearny. He holds B.A. in Business &amp; Commerce from Keio University (Japan)</p> <p>He was ranked second on "Entrepreneur Ranking in Japan" by Forbes Japan magazine in 2016, and ranked third in 2017.</p>
<p>Company Overview</p>	<p><u>Raksul</u> was founded in 2009; they use the Internet to select the best printing company from all over Japan that fits the customer's order needs. They developed a mechanism that provides high-quality printing at low cost by using the under-utilized capacity of printers. They have raised funds of 7.9 billion yen, and have also made a capital tie-up with Yamato Holdings. The company message is "Better Systems, Better World."</p> <p>Raksul won the "2015 Red Herring Top Global 100" award in 2015.</p>
<p>One Google Goal</p>	<p>No major engagements with Google so far (Cloud - 250+ G Suite acct; Ads - Move to GMS in 2019), but the following can be opportunities:</p> <ul style="list-style-type: none"> <li>● Ads: Print to Video</li> <li>● Cloud: Use ML to automatically optimize flyer design and layout</li> <li>● Strengthen relationships with one of the brightest Japanese tech startups and/or ask Matsumoto san to be involved in the future GFE activities</li> </ul>
<p>Sensitive areas hot button issues</p>	<ul style="list-style-type: none"> <li>● No sensitive areas/issues to be aware of at this point</li> </ul>



Keio Innovation Initiative, Inc.

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	<p><b>Mr. Kotaro Yamagishi</b> CEO</p> <p>Kotaro Yamagishi serves as CEO of Keio Innovation Initiative, Inc. (KII) which is Keio University's venture capital since its establishment in December 2015. Prior to KII, he co-founded GREE, Inc. in December 2004, and still serves as the company's board director. Earlier in his career, he was editor-in-chief of CNET Japan and editor at Nikkei Business Publications, Inc. He graduated from Keio University, Economics.</p>
<p>Company Overview</p>	<p><u>Keio II</u> is a venture capital established by Keio University, founded in 2015. Their mission is to innovate society through developing new industries which use Keio University's research results.</p>
<p>One Google Goal</p>	<ul style="list-style-type: none"> <li>● Strengthen the relationship with KII and foster collaboration with their portfolio companies in our startup support programs including Launchpad, People Labs, etc.</li> <li>● Exploit developing incubation function with Keio University through KII.</li> </ul>
<p>Sensitive areas hot button issues</p>	<ul style="list-style-type: none"> <li>● Nothing special</li> </ul>

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Meeting Notes:

**Wakana-san:** Thanks for coming, Hope you enjoy the breakfast. Now opening up discussion and please enjoy morning talk. Could you briefly self intro yourself?

**Matsumoto-san:** Thanks for inviting. Very exciting to see this space. I am an entrepreneur in Japan. My business is similar to Uber for print business, connecting and utilizing printer. Went public last July. We are going to change the structure of Japanese industry. Now we have focus on ad space. Image is and offline ad network such as TV commercial, billboard. We hope that every customer, including SMB, can access to those ads.

**Muroyama-san:** I have been working for LINE 1.5 years. I'm responsible business development. Typically working on Japanese mobile business, cloud & AI business. Also working on global projects. Looking forward for new opportunity. LINE has 75 million MAU in Japan, that means that almost a half of Japanese population use LINE. Keen on having discussion.

**Ryu-san:** Thanks for coming. Ryu, running partnership at Google

**Abe-san:** Looking forward to have discussion with each of you.

**Patrick:** I work on partnerships such as maps and search.

**Yamagishi-san:** I am a venture capitalist and entrepreneur. Keio is the oldest university in Japan. And it's also well known for science and medical. We partner with Nomra, venture fund to support technology such as IT and big data. I have co-founded GREE- Japanese SNS which is similar to facebook. GREE is now providing game.

**Ogata-san:** Maybe I'm the oldest in the room - I am from JR, Vice Chairman. Same company for more than 44 years. Responsible for everything but especially around open innovation. Happy to work together with Google. Negative image stays within rail company. Very happy to show Google exec our station, management, and technology.

**Ito-san:** Board member of StartToday, ZOZOTown. I am responsible for our private label. ZOZO is new brand focuses on fit. You measure yourself for your clothes. We are looking for global expansion. Asahi was biggest client when I was running start up. I have run the start up 14 years, then sold to Zozo.

**Bonita:** Lead US publishers partnerships such as broadcast and news. 2nd time in Japan. Level of technology and innovation for Japan is very high from US perspective. Would like to share best practice from the US.

**Peter:** Responsible for business operation in Japan. 3 years in Japan. There are so many amazing innovations in Japan.

**Dave:** Thank you, this is such a great experience. I am responsible for the distribution of Google's product.

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**Ohnishi-san:** I'm from Asahi, responsible for digital business and international business. I'm amazed to see how people are connected. Very impressed. For my responsibilities, half of my job is transformation of digital business. The rest is to work with external companies. JP tend to work in-house such as no contributed writer, no external working partners. Not much experience with working outside partners. This is news challenge for us.

**Don:** I run global partnerships at Google. It's a worldwide org. We work with top partners and try to bring the best of Google. Commercialize number of products like maps and search. We are working effectively with other teams within Google. 18 years working on investment. Especially off balance sheet investment. I am SpaceX board member. We invest to build connection, partnership perspective. Google has always build on a partnership like AOL and Yahoo, distribution of our product. Google benefit from healthy ecosystem from any industry. We want to use our tools. Distribute to run our mission. We are a product company, building a product. Sundar is more contact operated, like he deeply cares ecosystem and industry. That's why we listen. Sundar is focused on 1)Cloud 2)Hardware such as phone and assistant devices. We are not trying to become Apple. We are trying to build a device that makes good experience. 3) AI/ML to generate user product. Google photo uses machine learning technology. Sundar is also passionate about democratizing ML like tensor flow. Important commitment by the company. We all benefit and that comes back to Google. Deeply care about ethics. We are complicated places. We are trying to organize partnership teams. Bring the best of Google to you, to learn from you. Make the right product decision. How we could be better partners.

**Ohnishi-san:** We work with Google on 3 different partnership. 1) transformation of newsroom. Before our partnership, NewsLab visited the company. We have to improve our newsroom another step forward. Now our newsroom is talking with Google. Important thing is to change the middle layer. We have to change middle layer, because the younger generation know how to change. What we are trying to change now is to change middle management. 2) Digital business monetization 3) Developing new business. More younger generation are not watching TV, we are working with broadcasters. Big challenge for us. We are not sure we can make big challenges but we need to try.

**Ryu-san:** Middle layer management problem is same for every Japanese old company.

**Don:** I spend tremendous time with Bonita. If we can help, we have tons of ideas.

Bonita: We can connect with US companies

**Ohnishi-san:** CNN and The New York Times. They hire news journalist and hire business team with digital knowledge.

**Ogata-san:** We have a history of more than 150 years. Not only the middle layer but younger generation is also trying to stay the same. Because as a company we have to keep the track. That is why our mindset tend to be very traditional. I don't like that as a top management. I have put together System department and R&I department to promote open innovation. We have done many open innovation. What we are trying to do is something very valuable to the community. We carry the largest number of people in the world. Our market is expanding to the world. Suica is available outside of Japan. Many inbound tourists come to Japan today. In such case, the number of customer is our assets. We would like to provide better service utilize AI/ML. We have huge # of assets. Many thing to control and maintain. So we have huge data. Very different from US rail companies.

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**Don:** I think Japanese bullet is the future. Your company is not as traditional as you think.

**Ogata-san:** We never stop R&D. We need to be the safest and comfortable transport. Noise reduction is a target. Very difficult issue to solve. Want to make our future intelligent both inside and outside. For 2020, we are working on platform to establish mobility of people. We would like to provide any information, any payment, entertainment, and information to the customer.

**Ito-san:** Most of our traffic is search from Google, we owe you. Our ZOZOTown has 6000 brand. Lots of that is coming from search. You see ZOZOTown pop up. You click, it's available, it's cheap. We want to change consumer behavior. Change is happening for example, I ask Google on today's weather every morning to decide what to wear. ZOZO has customer's size. With AI and with different services, we can tap into preferences as well. Completely see change is happening. Next 10 years is going to be massive. We know exactly what people want. We are trying to develop our AI tool. It's called WEAR. 25 million users in Japan. If the question is "what should I wear today". We have millions of people buying from ZOZOTown. We know what they bought in ZOZOTown. We can suggest what that person should wear. It would be amazing if it worked but has to be at the amazing level.

**Ryu-san:** That can be integrated to GSuite. How is your strategy on going global?

**Ito-san:** ZOZOTown has counterpart in different regions in the world such as Zolanda group in Europe. Our fashion label is borderless. Anybody in the world needs a good pair of jeans. We feel we can scale globally. I personally think super high custom clothing is next. Hope we can be next Zara. Women clothing is next phase. Once everything is in place, then to style. Totally possible but building block is necessary.

**Muroyama-san:** Sometimes it's complicated but we should continue to provide great service. Google and us should be competing. But there are a lot of space we can work together. We can continue discussion together. We are happy to have any kind of discussion. Industry has experience and knowledge. Tech company should know what we can not do and what we can provide. We need to work together with industry. If we can foster this kind of mindset, we can create innovation.

**Yamagishi-san:** From my point of view, startups in JP is good entry point for Google Cloud. Once startup start using AWS, then they keep using. AWS is reaching out to those startups. Google's advantage is digital marketing. By supporting them, you can communicate with them in the beginning. If you support Japanese startup, Google can be successful in Japan's startup community.

**Peter:** We will announce more how we can work for Japanese startup. More to come. Looking forward to support ecosystem.

**Matsumoto-san:** I think there are 2 areas we can work and that are logistics and ad space. Logistics is changing drastically. Son san is investing in automotive industry. Mobility marketplace has network effect. Japan is not so exciting for internet world but 3rd biggest country in terms of GDP. I think the next 3 to 5 years, a lot of tradition will change. Network effect, we need huge capital. Opportunity to change logistics. 100 billion industry. Every large company will be consolidated. It happened in China and US. We need capital and technology. We need to optimize our logistics. Big opportunity to connect technology to the local market place. Disrupt the ad is what I want to do. Digital ad is growing very



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rapidly. 15 billion dollar. TV is 20 billion dollars. Offline ad space has 40 billion dollars. Digital is not only the utility and we still have analog. I want to change analog. It's seamless to digital. Very huge market. Network offline advertising and change the structure of the industry. I would like to have a partner to change.

Event Title: Roundtable breakfast with Don Harrison)



Event Title: Roundtable breakfast with Don Harrison)



For Moderator: Guest Questions for Wakana

- Comment [3]:** +shinobu@google.com  
+keisukeh@google.com こちら、想定質問を一緒に考えていただいてもよろしいでしょうか？  
Thank you so much!  
\_Assigned to Shinobu Yamazaki\_

**Comment [4]:** いくつか考えて記入してみました。もう少し他にもアイデア考えます！

**Comment [5]:** LINE、朝日新聞、ラクスルに一つずつ追加しました

**Comment [6]:** ありがとうございます！

**Comment [7]:** LINEは現在の4カ国からさらに広げていく考えはないです。

Event Title: Roundtable breakfast with Don Harrison)

LINE株式会社 / 室山 真一郎 / 執行役員

- 国内でラインの利用者数は7000万人（日本人口の50%以上）を突破、台湾、タイ、インドネシアでもアプリを提供し、4カ国のユーザー数は1億6000万人以上。モバイル決済の成長が期待から、7月末の時点でラインの株価は25%超の上昇。(here)
- 今年のLINE CONFERENCEでは、新しい機能多数発表。LINEのAIスピーカーClovaや、「LINE ショッピング」で使えるGoogle Lens的な機能「ショッピングレンズ」など(here)
- LINEが2018年上半期から自転車シェアリングサービスを始める。中国最大手のMobike（モバイク）と提携し、日本法人モバイク・ジャパンの取締役を1月から兼任。東京を中心に展開し、LINEの圧倒的な顧客接点を活用し、日本で一番使ってもらえるサービスを目指す。(here)
- One of the first products he directed is "LINE TICKET" which is a new electronic ticket service tied up with Amuse, announced in May. It provides an all-in-one purchase process through LINE. (here)
- 質問：御社のサービスは日本で非常に大きなマーケットシェアを持ち、さらにタイや台湾などでも多くのユーザーを獲得していると思いますが、今後特に重視する国としてはどのあたりをお考えでしょうか。
- 質問：中国のMobikeとの提携など、多くのユーザーをもつプラットフォームとしてパートナーを選ぶときの条件や判断基準、考え方について教えていただけませんか？

朝日新聞 / 大西 弘美 / 執行役員

- 朝日新聞デジタルの登録会員数は2017年時点で約293万人（有料・無料会員含む）ビジネスは定期購読モデルが基本だが、デジタルビジネスではネイティブアドや、リッチコンテンツ、SNSの活用やリアルイベントとの連携などで周辺ビジネスを育てていくことが重要。(here & here)
- 大西氏は2013年7月からMITメディアラボにへ派遣。その経験からも「デジタル化はメディアの危機ではなくチャンス」とポジティブに捉えている。2014年12月に執行役員 デジタル・国際・教育事業担当となる。
- 朝日新聞デジタルでも「いきもの目線」という水族館や動物園を360度映像で体験できるコンテンツを展開。スチール写真が一瞬を切り取るのと違い、360度コンテンツはユーザーが見る場所を選ぶことができる。つまり、視点が変わってくるとのこと。見ている人が視点を外部化できるので、物事をより「自分事化」でき、これまで以上に追体験できるようになる。デジタルを使ってどうやって伝えていくかを考える必要があり、今後のVRジャーナリズムの課題。(here)
- 質問：朝日新聞様はメディアラボを2013年に立ち上げられ、スタートアップ支援やベンチャー企業との連携による新規事業創出に取り組まれています。このようなパートナーシップを進めてこられた背景とその効果や、具体的な成果などをシェアいただけませんか？

株式会社スタートトゥデイ / 伊藤 正裕 / 取締役

- 今年会社設立20周年を迎えたが、今も業界関係者や消費者を驚かすチャレンジを続けており、サイズ問題の解消を原点とした同社初のプライベートブランド（PB）「ゾゾ」と、採寸用ボディースーツ「ゾゾスーツ」の取り組みは業界の垣根を越えて注目されている。(here)
- 2015年12月にスタートトゥデイが、グループ会社のヤッパの社名を改め、同社とヤッパのエンジニア・デザイナー100名以上を集約させた新会社「スタートトゥデイ工務店」を設立。システム開発・WEBデザイン・CRMに取り組む会社で、代表取締役CEOには、元ヤッパ代表取締役の伊藤正裕が就任。(here)
- 「ゾゾタウン」を運営するスタートトゥデイで技術部門を率いる伊藤正裕氏は、日本での起業の厳しさを経験。17歳で会社を立ち上げたが、失敗している。伊藤氏は、たとえばビジネスの所有者が株式の80%を投資パートナーたちに売却したとしても、所有者は引き続きローンの100%の

**Comment [8]:** +wakanat@google.com  
LPS, GMS, Cloud, Google Analytics, Playを含めたJBPを6月に合意し、がっつり組んでいただいているので、Googleとのパートナーシップについてポジティブに話していただけるはず。LINEとZOZOにぜひ聞いてもらいたいの。でGoogleとの提携について聞いてください。  
\_Assigned to Wakana Tanaka\_

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責任を負わなければいけない。加えて、日本では一度破産すると、将来にわたって信頼を得ることが非常に困難なため、起業の精神的ハードルは高い。個人が負う保証の負担を軽くする道が開ければ、より多くの人が起業に挑戦するのではないかと話す。(here)

- 中国事業は1年半持たずに撤退 (here)
- スタートトゥデイの社長、前澤友作社長はよくメディアを騒がす。現在、女優の剛力彩芽との交際中。元カノは紗栄子。9月中旬に重大発表予告。
- 質問：ゾゾスーツなど御社の取り組みの多くは非常に斬新で世の中を驚かせるものがありますが、そういった姿勢、考え方を持つ会社のカルチャーを保つために何か心がけていることはありますか？

**Comment [9]:** +wakanat@google.com

ゾゾスーツは、従来通りのeコマース企業から、データを中心としたエコシステムに会社を変えていく根本的な取り組みです。ユーザーのサイジングデータを集め、活用するというアイデア自体はアパレルの世界では斬新ではないですが、今回はそのデータの収集の仕方と事業のスケールがunusualです。そういった聞き方に変えてください。

\_Assigned to Wakana Tanaka\_

東日本旅客鉄道株式会社 / 小縣 方樹 / 取締役 副会長

- 毎日1710万人の利用者を抱えるJR東日本が見据えるデジタル革命について、JR東日本ではAIやIoTを現場に導入し、サービスの向上さらには移動時間の短縮を目指す変革を社内でも推進している。(here)
- 2018年6月、公益社団法人企業情報化協会の新会長にも就任。「ITを有力な手段として戦略的に活用し業績向上を目指すことは、現代の経営を考える上で不可欠な要件となっている。しかし企業情報化の現状をみると、未だに部分最適の段階を踏破できず、企業プロセスや組織全体の最適化を目指した戦略的ステージに到達しうる企業は依然少ない状況にある」と述べた。
- 質問：SUICAの持つデータの有用性については多くの企業が注目していると思いますが、その利用の方向について どのようなプランをお持ちですか？
- よく海外からの旅行者が新幹線やJRの長距離きっぷをモバイルでもっと簡単に購入できると助かる、と言っているのを耳にしますが、そのあたりはどうお考えですか？

**Comment [10]:** +wakanat@google.com

昨日戦略についてのプレゼンを副会長よりいただいています。その中で、STTT (shortest total time travel) という考え方がありました。1地点から1地点にpublic transportをうまく組み合わせて最短の時間でたどり着くにはどうする、という考え方です。JRのような伝統的な会社からこういった発想が出てくるのはすごいことだと思うので、ご本人に事前に確認の上、OKであれば、考え方を話してもらうのは面白いと思います。

\_Assigned to Wakana Tanaka\_

ラクスル/松本 恭攝 / 代表取締役社長CEO

- ラクスルのユーザー会員数は45万を超え、15年12月に物流のシェアサービス『ハコベル』も始めた。シェアリングエコノミーで印刷や物流の常識を変えつつある同社は2017年ヤマトHDとの資本提携を発表。
- 親類縁者がすべて公務員という環境に育つ。2008年に慶應義塾大学商学部を卒業し、コンサルティング会社のA.T.カーニーに入社。M&Aや新規事業、コスト削減プロジェクトなどに携わる。その過程で印刷業界の非効率さ、コスト削減効果の高さに気づき、09年にラクスル株式会社を設立。産業構造の変革を行う。家族は妻と一男一女。プライベートでは息子と娘と遊ぶのが大好きなパパで保育園に送る朝のひとつときを楽しみにしている。週末の子連れイベントは水族館がブームで前週は八景島シーパラダイスに行った。仕事の原動力は一番に子供、そしてアート。(here)
- 質問：ラクスル様のビジネスは印刷業というデジタル化があまり進んでいなかった産業をインターネットを活用し、効率化し、より質の高いサービスを安価に提供するものに進化させたと理解しています。一方で古い業界をデジタル化していくのは非常に困難だったと想像しています。サプライヤー側（印刷工場）をどのように開拓、説得され、ビジネスを拡大されたのでしょうか？

慶應イノベーション・イニシアティブ / 山岸 広太郎 / 代表取締役社長

- グリーの共同創業者で、現在は慶應義塾大学発のベンチャーキャピタルである慶應イノベーション・イニシアティブ社長を務める山岸氏は、雑誌編集者、ウェブ開発、ウェブメディアの編集長を経て、ベンチャー起業家に転身した異色の経歴の持ち主。(here)
- 質問：よく、日本は他の国に比べてスタートアップが育ちにくいと言われますが、今もそうだと思いますか、あるいはその状況は少しずつ変わってきていると感じられますでしょうか。

Event Title: Roundtable breakfast with Don Harrison)